

# ePM Quick Reference Guide #138

## Create a Contact Only User

### WHAT IS

Project Certifiers (Project Managers) and Program Certifiers have the ability to request Contact Users. Once the request is submitted through the User Access and Certification (UAC) Tool, the users will be activated and ready to be added to workspaces immediately.

### WHO USES

- Project Managers
- Regional System Administrators
- Program Certifiers

### HOW TO

1. Using Internet Explorer, go to the [ePM Portal](#).
2. Click 'UAC Tool' in the list of applications.
3. Click the User Access tab.
4. Click the User Request page.
5. Click the Add icon in the toolbar.



6. In the web grid, enter the following information:
  - Region
  - User's full legal name: First, Middle (if no middle name enter NMN), Last
  - Display Name
  - Title
7. Select a Company by clicking the Search icon.



8. Enter the company name in the Search box. Select the company and location as displayed below:

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The screenshot shows the 'Select Company' window with the search filter 'A & R' applied. The results table is as follows:

Select	Company Name	DUNS #/AB Code
<input type="radio"/>	A & R Electric	

Below the company list, there is a 'New Location' section with a table of addresses:

Select	Address 1	Address 2	Address 3	City/Town	State
<input type="radio"/>	55555 144 Street			Washington	DC
<input type="radio"/>	2 AR Shippers Way			Cornelius	NC
<input type="radio"/>	AR Shipping Way	Route 1	Port 5	MyCity	NC

NOTE: When adding a GSA employee, put a check box in the GSA Companies box to display a list of GSA locations.

The screenshot shows the 'Select Company' window with the 'GSA Companies' checkbox checked. A red arrow points to this checkbox. The results table is as follows:

Select	Company Name	DUNS #/AB Code
<input type="radio"/>	LMI	
<input type="radio"/>	LPOE SME	
<input type="radio"/>	Michael Sullivan	
<input type="radio"/>	PBS	
<input type="radio"/>	PGE	
<input type="radio"/>	R01	
<input type="radio"/>	R02	
<input type="radio"/>	R03	
<input type="radio"/>	R04	
<input type="radio"/>	R05	

- If the correct location is not displayed, click 'New Location'.

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**New Location**

Company Name: A & R Electric

\*Location Type: [Dropdown]

\*Location Name: [Text Box]

\*Street Address: [Text Box]

[Text Box]

[Text Box]

\*City/Town: [Text Box] \*State/Territory: [Dropdown] \*Zip Code: [Text Box]

[Save] [Cancel]

- a. Select Location Type from the dropdown menu.
- b. Enter Location Name, Street Address, City, State, and Zip Code.
- c. Click 'Save'.
10. Enter the Phone Number and Email Address.
11. Select Contact Only as the User Type.
12. Click 'Submit' in the toolbar.
13. The user account will be created in the Active workflow state.
14. If the user currently exists in ePM, the Status column will note an error (to view the details hover over the icon in the Status column). In this case, the user record must be validated or removed to continue.

User Access & Certification

User Request Workspace Access User Approval

Add Remove Submit Refresh Logout About Valerie Pierre

Requests Actions System Logged On

Drag a column header and drop it here to group by that column

First Name*	Middle*	Last Name*	Display Name*	Title*	Company*	Phone*	Email*	User Type*	Status	Proceed
Valerie		Pierre	Valerie Pierre	Program Analyst	Procon Consulting LLC	555-555-5	valerie.pierre@gsa.gov	Contact Only	[Warning Icon]	[X]

The following Contacts or Staff appear to match one or more of your user requests. Please review the potential duplicate(s) and take the appropriate corrective actions.

Procon Consulting LLC : Valerie Pierre

15. To validate put a check in the Proceed column.

User Access & Certification

User Request Workspace Access User Approval

Add Remove Submit Refresh Logout About Valerie Pierre

Requests Actions System Logged On

Drag a column header and drop it here to group by that column

First Name*	Middle*	Last Name*	Display Name*	Title*	Company*	Phone*	Email*	User Type*	Status	Proceed
Valerie		Pierre	Valerie Pierre	Program Analyst	Procon Consulting LLC	555-555-5	valerie.pierre@gsa.gov	Contact Only	[Warning Icon]	<input checked="" type="checkbox"/>

If valid user, select Proceed.

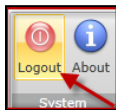
16. To remove, select the row and click 'Remove' in the toolbar.

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17. When complete click Logout' in the top tool bar.



18. Click 'Save' in the top toolbar.

## REFERENCE

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the [ePM Portal](#).

- QRG 02 - Using the ePM Address Book